



# MaintenanceDirect User Manual

## Technician Guidelines

Version 2.0

SchoolDude.com, Inc.

SchoolDude Support:  
Phone: 1-877-883-8337  
Email: [support@schooldude.com](mailto:support@schooldude.com)

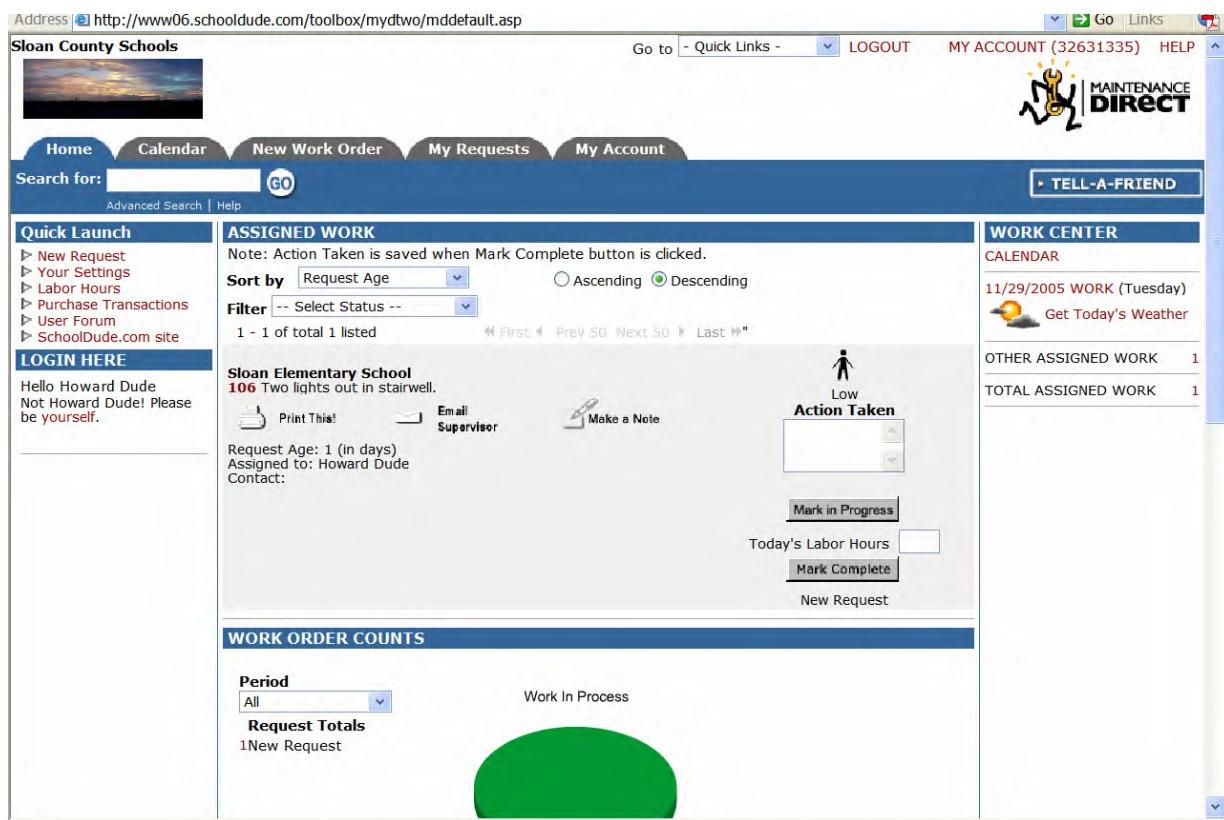
## Technician Table of Contents:

<b>Technician .....</b>	<b>1</b>
I. Welcome to the Home Page! Now What? .....	1
II. My Account .....	4
III. New Work Order .....	6
IV. Searching for Work Orders .....	8
V. Editing Work Orders .....	14
VI. Entering Labor and Purchase Transactions .....	16
VII. My Requests .....	20
VIII. Closing Work Orders .....	21
IX. Using the Calendar .....	23

# Technician

## I. Welcome to the Home Page! Now What? *(A quick overview of what's on the Home page.)*

Once you've logged in with your user name and password, you're taken directly to your Home page. It should look something like this, once work orders have been entered into the system and assigned to you:



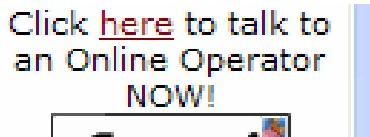
The screenshot shows the MaintenanceDirect Home Page. At the top, there's a banner for 'Sloan County Schools' featuring a sunset image. The top navigation bar includes links for 'Home', 'Calendar', 'New Work Order', 'My Requests', 'My Account', 'Logout', 'My Account (32631335)', and 'Help'. A 'TELL-A-FRIEND' button is also present. The main content area is divided into several sections:

- Quick Launch:** Includes links for 'New Request', 'Your Settings', 'Labor Hours', 'Purchase Transactions', 'User Forum', and 'SchoolDude.com site'.
- LOGIN HERE:** Displays a message: "Hello Howard Dude. Not Howard Dude! Please be yourself."
- ASSIGNED WORK:** Shows a list for 'Sloan Elementary School' with one item: "106 Two lights out in stairwell". It includes sorting by 'Request Age' (Ascending or Descending), a filter dropdown, and pagination (1 - 1 of total 1 listed). Buttons for 'Print This!', 'Email Supervisor', and 'Make a Note' are available. An 'Action Taken' section shows a dropdown menu with 'Low' selected, and buttons for 'Mark in Progress', 'Today's Labor Hours', 'Mark Complete', and 'New Request'.
- WORK ORDER COUNTS:** A chart titled 'Work In Process' showing a single green segment labeled '1 New Request'. A dropdown menu for 'Period' is set to 'All'.
- WORK CENTER:** Includes a 'CALENDAR' section showing '11/29/2005 WORK (Tuesday)' and a 'Get Today's Weather' button. It also shows 'OTHER ASSIGNED WORK' (1) and 'TOTAL ASSIGNED WORK' (1).

Across the top of the page, you will see that there are five tabs reading: "Home", "Calendar", "New Work Order", "My Requests", and "My Account". Each of these tabs will be discussed in detail further on but for now, let's take a look at the Home page. It contains the following sections:

- 1. Quick Launch:** This section provides commonly used links including, New Request, Your Settings, Labor Hours, Purchase Transactions, User Forum (a place to submit questions and/or problems you encounter while using MaintenanceDirect. You can also read questions others have posted.), and SchoolDude.com site.

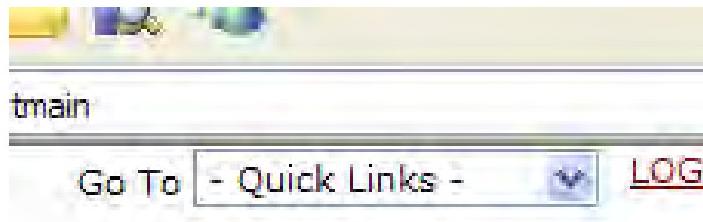
2. **LOGIN HERE**: If you are logged in, you should see your name here. If you do not see your name, click the word “**yourself**” to log in correctly.
3. **ASSIGNED WORK**: In the center of the Home page near the top, you'll find the Assigned Work section, where all work orders assigned to you will display. From this section, you can view, print, and sort your work orders, as well as make notes, email your supervisor, and mark work orders as “In Progress” or “Complete”. You can also record action taken, see how old a particular work order request is, and record the number of “Today's Labor Hours”.
4. **WORK ORDER COUNTS**: The graph in this section shows the number of work orders assigned to you by status. To filter the graph by period, select the desired period from the dropdown box provided. The numbers next to each status are the number of work orders currently in that status. Click the **number** to view a list of all work orders in the status.
5. **WORK CENTER**: The Work Center provides links to the monthly calendar as well as today's work. There is also a link to get today's weather. The total number of assigned work orders is displayed here, along with the total number of assigned PreventiveMaintenanceDirect work orders (if you are a PreventiveMaintenanceDirect client).
6. **Help** links are available in the bottom right-hand corner of your Home page, as well as at the very bottom of the page, just above your contact information. Clicking on the **Help** link in the top right-hand corner will take you to the MaintenanceDirect manual at any time. If you need to communicate directly with SchoolDude Support, however, go to the two links in the bottom right-hand corner of your Home page. To connect directly with someone from SchoolDude support via Instant Messenger, click on the word “**here**” (underlined and highlighted in red). See



To write and send an email directly to SchoolDude Support, simply click on the Email icon directly below the link we just mentioned. The email link looks like this:



7. **Quick Links** provides you with a way to navigate quickly between SchoolDude products. In other words, if you would like to move from MaintenanceDirect to another product used by your school for whatever reason, all you have to do is click on the Quick Links drop-down box, choose the SchoolDude product you'd like to visit, and you'll be taken to that product's Home page automatically. Quick links is located at the top of the Home page, near the right-hand corner, and looks like this:



8. **Did you know? 🎉**: Just a bit of interesting trivia we thought we'd share each day, located at the very bottom of your Home page.

## II. My Account: Your Information in a Nutshell.

Before we get started with the nuts and bolts of the work order process, let's take a minute to check out the My Account page, which contains your information as entered by the Administrator during the account setup process. Use this page to edit your information or to change your password.

Your My Account page should look something like this:

Sloan County Schools      Go to - Quick Links -  MY ACCOUNT (32631335) HELP



Home    Calendar    New Work Order    My Requests    My Account

Search for:   Advanced Search | Help

Legend:  Indicates required information.  
 Account Administrator

**Work Order Participant Information**

**Login Name**

**First Name**

**Last Name**

**Email**    
 Receive email notifications.

**Reports To** Ben Dude  
(Note: Reports to fields helps supervisors and administrators process and manage work assignments.)

**Personnel Type**

**Phone Number**

**Fax**

**Pager**

**Pager Email**  Notify electronically by Pager?  
(Note: Pager notifications for work requester is not supported. Unit must support text-based electronic notifications. You can test [here](#).)  
  
 Notify Pager Email only for Emergency Work Orders.

**Cellular Phone**

**Cellular Email**  Notify electronically by Cellular Phone?  
(Note: Cellular notifications for work requester is not supported. Unit must support text-based electronic notifications. You can test [here](#).)  
  
 Notify Cellular Email only for Emergency Work Orders.

**Change Password**

**Old Password**

**New Password**

**Verify New Password**

---

Home    Calendar    New Work Order    My Requests    My Account

Click here to talk to an Online Operator NOW!

Powered by: 

Conditions of Use | Privacy Policy | Security Statement

[LOGIN](#)   [SERVICES](#)   [MY ACCOUNT \(32631335\)](#)   [HELP](#)

Need help? Call us 1-877-868-DUDE (3833)

Copyright © 1999-2001 SchoolDude.com, Inc. All Rights Reserved. [Legal Stuff](#)



- Make any changes you wish to make and click **Done**. If you don't want to change your password at this time, you don't have to. Your changes will be made anyway.
- When you click Done, you will be taken back to your **Home** page.



**SCHOOLDUDE SAYS:** If you don't see the change immediately, for instance, if you changed the spelling of your name and the spelling hasn't changed under the **Login Here** section, don't worry. Next time you log in, you'll see that the change has been made.

### III. New Work Order: MD in Action.

Technicians have the ability to enter new work order requests in MaintenanceDirect. To do so, you will need to click on the **New Work Order tab** at the top of your **Home** page and fill out the following form on the **New Work Request** page. You can choose whether or not the new request will be assigned to you or if it will be routed according to your system routes. (Keep in mind that  indicates a required field.)

Sloan County Schools

Go to - Quick Links -  MY ACCOUNT (32631335) HELP

Home Calendar New Work Order My Requests My Account

Search for:   Advanced Search | Help

TELL-A-FRIEND

New Work Request

Welcome

To submit your request complete the following form.

Indicates required information.

**Step 1 Location**

-- Select Location --

Building

Area

Area Number

**Step 2 Select Problem Type:**

Click [here](#) for Maintenance Emergency Contacts  
Click on the problem type below that best describes your issue.

 Athletic Fields	 Audio/Visual	 Cafeteria	 Carpentry
 Climate Control	 Custodial	 Electrical	 Food Services
 Heating/Ventilation /Air Conditioning	 Lighting	 Office Supplies	 Plumbing
 Windows			

Check here if this is an emergency or call any of the emergency contacts below.

<b>Contact Name</b> Melissa Dude	<b>Contact Phone</b> 919-555-9999
-------------------------------------	--------------------------------------

**Step 3 Please describe your problem or request.**

**Step 4 Requested Completion Date**

**Step 5 Please provide contact information for follow-up questions and notifications.**

<b>First Name</b> <input checked="" type="checkbox"/> Howard	<b>Last Name</b> <input checked="" type="checkbox"/> Dude	<b>Email</b> <input checked="" type="checkbox"/> HDude@geewiz.com
<b>Phone</b> 919-555-1647	<b>Pager</b> <input type="text"/>	<b>Cellular Phone</b> <input type="text"/>

**Step 6 Will you perform this work?**

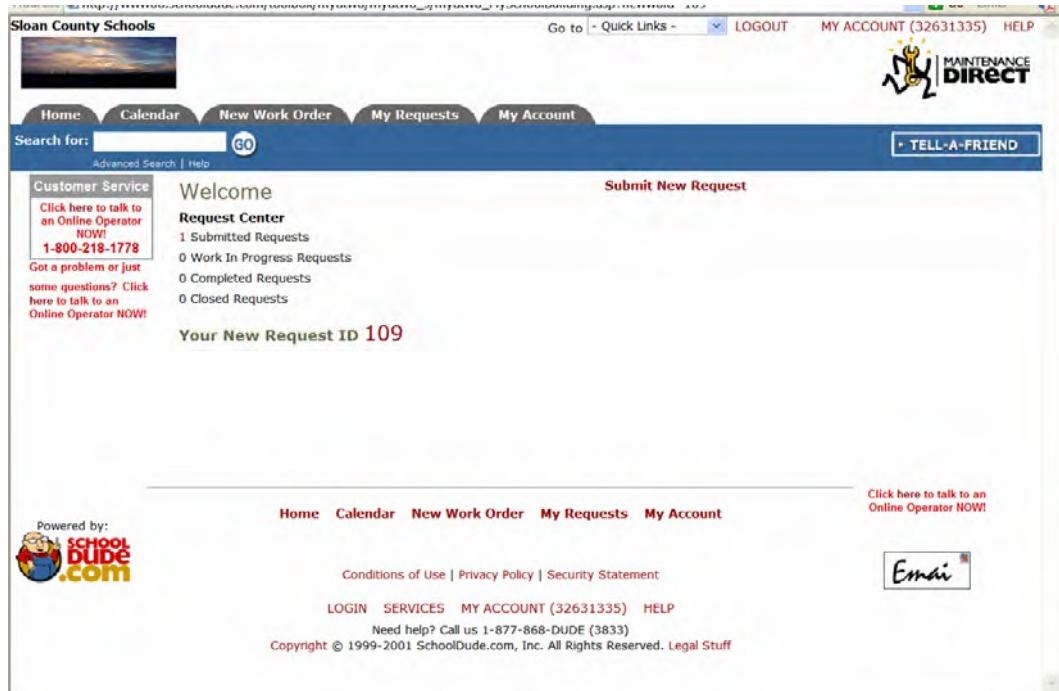
Yes  No

**Step 7**

Click here to talk to an Online Operator NOW!

Home Calendar New Work Order My Requests My Account

- Enter your **Location**, Area, and Area/Room Number.
- Select the **Problem Type** that best describes your issue. For example, if a toilet is leaking, that would be a plumbing issue. Once you click on a problem type, the page will refresh and your problem type will be highlighted with a red circle. If this is an emergency, check the Maintenance Emergency box below the problem types list.
- **Describe** your problem or request.
- Enter the **Requested Completion Date**. Click the calendar icon next to the date field to choose a date from the calendar.
- Your **Contact Information** (first and last name, email, phone, etc.) will automatically be entered into the fields in step 5.
- If you will **Perform This Work**, click **Yes**. The work order will then be assigned to you. If you would like to submit this work as a new request to be routed to your maintenance department, click **No**.
- Click **Submit**.
  - You will be taken to the following page, which will show the work order request you just entered and the WOID (Work Order ID number) that it has been assigned.



## IV. Searching for Work Orders: Find the Information You Need.

As a Technician, even though you will receive only those work orders that are assigned to you, you have the ability to search for work orders within MaintenanceDirect, using several different methods. You will then be able to see the work order in a view-only format. We will look at each search method individually so you can choose the one that works best for you.

There are four ways to find a work order:

1. Assigned Work
2. Search Using the “Search for” Field
3. Advanced Search
4. Work Order Counts

**1. Assigned Work:** All open work orders assigned to you will appear in the Assigned Work section of the Home page, fifty at a time. You can sort the list using several fields provided in the “Sort by” drop-down box: WOID (Work Order ID number), Location, Request Age, Request Description, Priority Description, or Status Description. You can also search in ascending or descending order by clicking the green dot for the corresponding choice provided.

Here is a look at the Assigned Work section of the Home page:

The screenshot shows the MaintenanceDirect Home page with a blue header bar containing links for Calendar, New Work Order, My Requests, and My Account. Below the header is a search bar with 'GO' and 'Advanced Search | Help' buttons. The main content area has a sidebar on the left with links for 'Inbox', 'RE', and 'Transactions'. The main content area displays the 'ASSIGNED WORK' section. It includes a note about saving action taken, sorting options ('Sort by: Request Age', 'Ascending', 'Descending'), and a filter dropdown ('Filter: -- Select Status --'). A message for 'Sloan Elementary School' is listed, showing '106 Two lights out in stairwell.' with a 'Print This!' button, an 'Email Supervisor' button, and a 'Make a Note' button. To the right of the message is a 'WORK CENTER' sidebar with sections for 'CALENDAR', 'OTHER ASSIGNED WORK', and 'TOTAL ASSIGNED WORK'. At the bottom of the main content area is a 'WORK ORDER COUNTS' section with a 'Period' dropdown set to 'All', a 'Request Totals' section showing '1 New Request', and a large green oval graphic labeled 'Work In Process'.

## More About “Assigned Work”...

Take note that in this section, as well as searching for work orders, you also have the options of taking several different actions:

- ✓ View the details of a work order or edit it (editing work orders will be discussed in further detail in the next chapter of this manual).
- ✓ Print the work order form, using the “Print This” icon provided ( [Print This!](#)).
- ✓ Email your supervisor (or other users in the system) by clicking on the Email Supervisor icon provided ( [Email Supervisor](#)).
- ✓ Add a journal note to a work order by clicking on the “Make A Note” icon ( [Make a Note](#)).
- ✓ Enter the action taken on a work order using the Action Taken field.
- ✓ Enter “Today’s Labor Hours” in the field provided



**SCHOOLDUDE SAYS:** To save Action Taken and Today’s Labor Hours, you must click the **Mark Complete** button. Doing this will change the status of the work order to “Complete” and will remove it from the list of open assigned work orders.

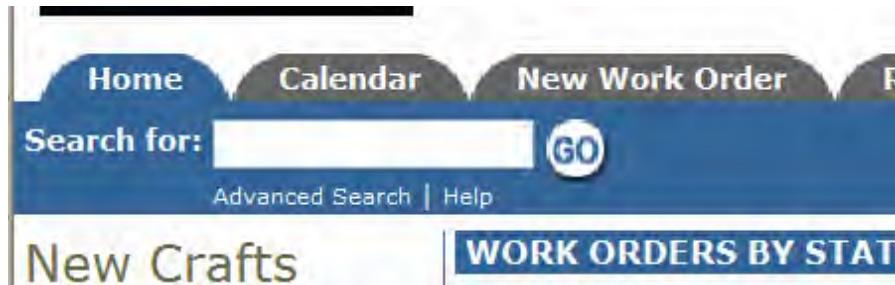
**2. Search Using the “Search for” Field:** This is the simplest search that you can perform. You can search for work orders using the search text box, located in the blue bar near the top, left-hand side of every page. See below:

The screenshot shows a web-based application interface. At the top, there is a blue navigation bar with several tabs: Home, Calendar, New Work Order (which is highlighted in yellow), My Requests, and My Account. Below the navigation bar is a search bar labeled "Search for:" with a "GO" button to its right. A large red arrow points to the search bar. Underneath the search bar are links for Advanced Search and Help. The main content area has a title "ASSIGNED WORK" and a note: "Note: Action Taken is saved when Mark Complete button is clicked." It includes sorting options ("Sort by Request Age") and filtering options ("Filter -- Select Status --"). The results section shows "1 - 1 of total 1 listed". At the bottom of the page are navigation links for First, Prev 50, Next 50, Last, and Last.

In this box, you can enter a work order number or a key word and click **Go** to search for the work order or information that you need.

For example, if you wanted to find work order #180, you would simply type “180” into the search box and click **Go**. That would then pull up the update page for that particular work order. If there is more than one work order which references work order #180, you would then see a listing of all matching work orders.

- 3. Advanced Search:** Underneath the search field discussed above, you will see a link that says “Advanced Search”.



- Clicking on this link will take you to the Work Order Search page, which will look something like this:

The screenshot shows the 'Work Order Search' page for 'Sloan County Schools'. The top navigation bar includes 'Home', 'Calendar', 'New Work Order', 'My Requests', 'My Account', 'Logout', 'MY ACCOUNT (32631335)', 'HELP', and a 'MAINTENANCE DIRECT' logo. The main search area has a 'Search for:' field and a 'GO' button. Below it are 'Advanced Search Shortcuts' for 'Work Order Search', 'Equipment Search', and 'Transaction Search'. A legend indicates that multiple choices can be selected using the Ctrl key. The search interface is divided into several sections: 'Location' (dropdown for 'Include ALL Locations' with options like Sloan Community College, Sloan Elementary School, etc.), 'Building' (dropdown for 'Include ALL Buildings' with option R. Sloan Gymnasium), 'Craft' (dropdown for 'Include ALL Crafts' with options like Athletic Fields, Audio/Visual, Cafeteria), 'Equipment' (dropdown for 'Include ALL Equipments' with option Blank -- Lawn Mower 1), 'Budget' (dropdown for 'Include ALL Budget Accounts' with options like Budget1 Marching Band Fund, Budget2 Athletics Fund, etc.), 'Priority' (dropdown for 'Include ALL Priorities' with options like Blank -- Emergency, Low, Medium), 'Status' (dropdown for 'Include ALL Statuses' with options like Blank -- New Request, Work In Progress, Complete, etc.), 'Area' (dropdown for 'Include ALL Areas' with options like Blank -- 1st Floor, 2nd Floor, etc.), and 'Project' (dropdown for 'Include ALL Projects' with options like Blank -- Playground Refu-). A tip at the bottom left says 'Tip: To select multiple choices in each list box use the Ctrl key to select.'

- On this page, you may choose any combination of search options from the listings and fields provided. Enter your options and click the **Search Now** button.

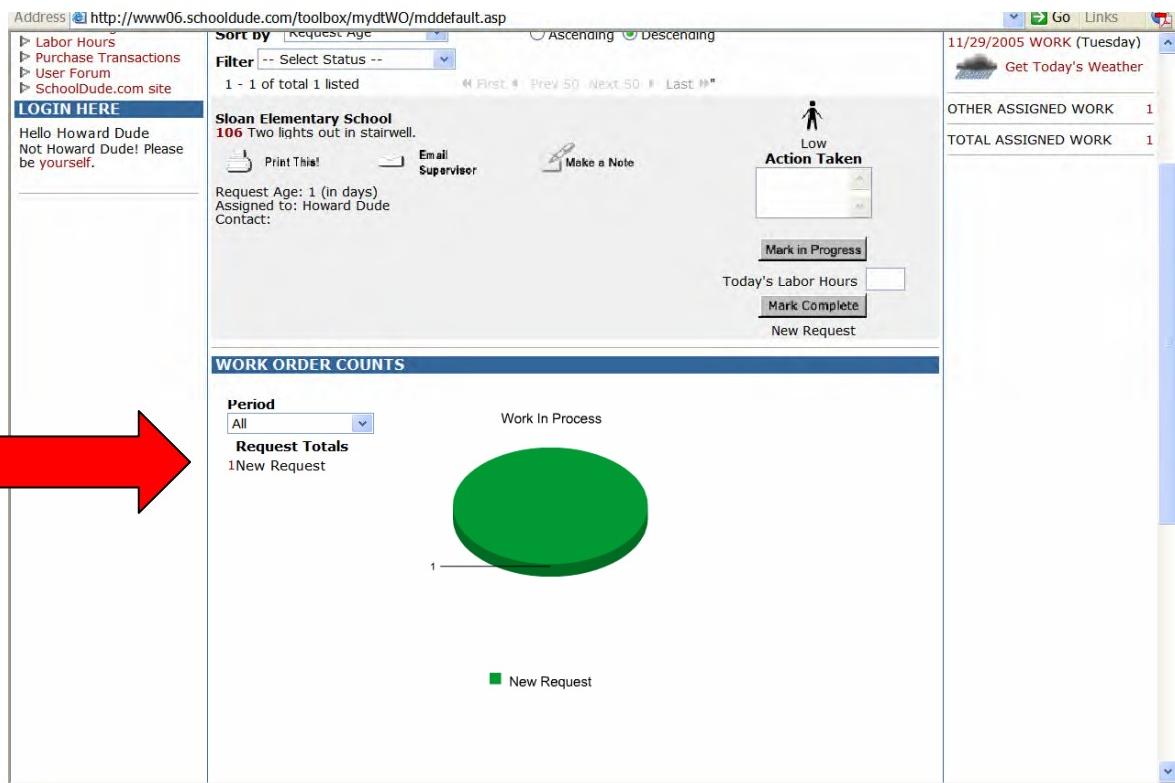


**SCHOOLDUDE SAYS:** An example of using the Advanced Search would be if you would like to search for all work orders with the status of “Work In Progress” for “Sloan High School” requested in September of 2003. In this case, you would choose “Sloan High School” from the Location list and “Work In Progress” from the Status list. In the request date fields, you would type “9/1/2003” to “9/30/2003” and then click **Search Now**. A list of all work orders that meet those particular criteria would appear. If there was only one work order to meet those criteria, the work order update page for that work order would appear instead of the list.

- To print out the results list, click on the **Print This** icon at the bottom of the results page. To print out a single work order, click on the printer icon (✉) next to the corresponding work order.
- To view a specific work order, click on the work order ID or the description.
- If you would like to send an email to the requester, click on the **requester name** to send an email via your email system (your browser and email must be configured to use “mail to” links).

**4. Work Order Counts:** You can view all of your work orders that hold a particular status by clicking on the number next to the corresponding status. You can edit the time period that is displayed in this section by selecting a new period from the dropdown box provided. Once you select a period, the page will automatically refresh, showing that period.

See the Work Order Counts section of the Home page below:



The screenshot shows the SchoolDude.com Home page with the following details:

- Address:** http://www06.schooldude.com/toolbox/mydtWO/mddefault.asp
- Left Sidebar:**
  - Labor Hours
  - Purchase Transactions
  - User Forum
  - SchoolDude.com site
- Header:**
  - Sort by: Request Age (Ascending/Descending)
  - Filter: -- Select Status --
  - 1 - 1 of total 1 listed
  - First | Prev 50 | Next 50 | Last
- Middle Content:**
  - Sloan Elementary School**
  - 106** Two lights out in stairwell.
  - Print This! | Email Supervisor | Make a Note
  - Request Age: 1 (in days)  
Assigned to: Howard Dude  
Contact:
  - Action Taken: Low (with a person icon)
  - Mark in Progress | Today's Labor Hours [ ] | Mark Complete | New Request
- Bottom Section:**
  - WORK ORDER COUNTS**
  - Period: All
  - Request Totals: 1 New Request
  - Work In Process: 1 (represented by a large green pie chart)
  - New Request (indicated by a green square)
- Right Sidebar:**
  - 11/29/2005 WORK (Tuesday)
  - Get Today's Weather
  - OTHER ASSIGNED WORK: 1
  - TOTAL ASSIGNED WORK: 1

- As work orders are assigned to you and their statuses change as you handle them, you will see more statuses listed in this section (marked by the red arrow above) and more colored sections will appear in the pie chart.

## V. Editing Work Orders: Adding Your “Two-Cents”!

Technicians have the ability to edit work orders entered into the system. However, this ability is limited in certain aspects. As a technician, for example, you can add information and details to a work order that you have done work on yourself, but you can't reassign a work order to another user.

To understand the work order itself in order to understand how to edit one, let's take a detailed look at the work order form and just what you can do, as a Technician, to edit it. See below:

The screenshot shows a web-based application for managing work orders. At the top, there's a header with the address 'http://www06.schooldude.com/toolbox/mydtWO/mddefault.asp', a 'Logout' link, and a 'MY ACCOUNT (32631335)' button. The main menu includes 'Home', 'Calendar', 'New Work Order', 'My Requests', and 'My Account'. A 'Search for:' field with a 'GO' button is also present. On the right, there's a 'MAINTENANCE DIRECT' logo and a 'TELL-A-FRIEND' link. The central area is titled 'ASSIGNED WORK' and displays a single work order for 'Sloan Elementary School' with ID '106'. The details show 'Two lights out in stairwell.' with a request age of '1 (in days)'. It's assigned to 'Howard Dude'. There are buttons for 'Print This!', 'Email Supervisor', 'Make a Note', and an 'Action Taken' section with a dropdown menu set to 'Low'. Below this is a 'WORK ORDER COUNTS' section with a green oval labeled 'Work In Process' and a 'Request Totals' table showing '1 New Request'. A red arrow points to the WOID '106' in the work order list.

- To view a work order in detail, click on the **WOID** (Work Order ID number), shown in red. The example above is marked with the red arrow.
- Once you click on the WOID, you will go directly to the work order itself. See example on the next page:

Address [http://www06.schooldude.com/toolbox/mydtWO/mydtWO\\_s/mydtWO\\_WOUpdate\\_tech.asp?woid=106&sql=&strnext=&strprev=&strfirst=8](http://www06.schooldude.com/toolbox/mydtWO/mydtWO_s/mydtWO_WOUpdate_tech.asp?woid=106&sql=&strnext=&strprev=&strfirst=8) Go Links

Sloan County Schools Go to Quick Links LOGOUT MY ACCOUNT (32631335) HELP



Home Calendar New Work Order My Requests My Account

Search for: GO Advanced Search Help

**Work Order Shortcuts**

 Talk About It! *	 Suppliers *	 New	 Request Info	 Contact Info	 Submit My Work
 Assignment Info	 Budget Info	 Deferral	 Action Taken	 Messages	 Journal Notes
 Transactions	 Approval Routing	 Attach File	 Print Form	 Print Details	 PM Schedule

\* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.

Legend:  Indicates required information.  
 Automatically saves on click.

Work Order: 106

Save Reset First < Prev Next > Last >>

Status <input checked="" type="checkbox"/> New Request	Priority <input checked="" type="checkbox"/> Low
Status Date 11/28/2005 1:01:49 PM	Created By BenDude
Status Last Changed By	

**Request Info**

Request Date <input checked="" type="checkbox"/> 11/28/2005
Request Description <input checked="" type="checkbox"/> Two lights out in stairwell.

The work order form contains the following fields as you scroll down the page (fields that you can edit are marked in red and include a description of what can be done):

- **Status:** you can change the status that a work order holds, based on what's been done.
- **Priority:** you can choose the priority of a work order (low, medium, high, emergency, safety, and scheduled).
- Status Date, Created By, and Date Created
- Request Information
- Contact Information
- **Assignment Information:** You can enter the **Actual Completion Date** in this section.
- Deferral Information
- **Budget information:** The **Purpose** of the request is displayed in a dropdown box. If it is incorrect, you can select a new purpose. The purpose is generally "why"

you are performing the work order. For example, if it is a work order for removing graffiti from a wall, the purpose could be “vandalism”. **Craft**, **Custom Category**, **Project**, and **Equipment** can also be selected in their corresponding fields.

- **Action Taken:** Enter the action taken for the work order. The requester will see this information.
- **Message Center:** This section allows you to send an email message regarding the work order to anyone in the system. It will also show email notifications sent out from our servers. To enter a new message, click the [New Message](#) link.
- **Journal Notes:** This section allows you to post journal notes regarding the work order. You also have the option here of sending out a reminder email for the journal note. To create a new journal note, click the [New Note](#) link.
- **Transactions:** In this section, you can add and edit Labor and Purchase Transactions. If you have SchoolDude’s InventoryDirect, you will also be able to add and edit Issue Transactions here. Transactions will be discussed in further detail in the next section of this manual.
- Approval Routing
- **File Attachments:** You can attach up to TWO files for each work order. They must be 3MB or less each.

## VI. Entering Labor and Purchase Transactions: How Much Was That Again?

The cost of a work order comes, of course, from the labor and purchase transactions attached to it. To track those costs, simply enter them into MaintenanceDirect and our system will organize them for you so that you'll always know exactly how much a work order costs and why.

- To get started with entering labor and purchase transactions, do the following:
- As you saw in the previous section, the second page of a work order contains a Transactions section where you can click one of two links:



- Clicking on the **New Purchase Transaction** link on the work order form will take you to the following page where you can enter and save all of the purchase transaction information for the current work order. See below:

A screenshot of a web browser showing the 'Purchases' page for Work Order 106. The page has a blue header with the Sloan County Schools logo, a search bar, and navigation links like Home, Calendar, New Work Order, My Requests, and My Account. A 'Legend' note says a red checkmark indicates required fields. The main area shows a table with fields for Description, Location, Status, and Assigned To, all filled with placeholder text. Below the table are various input fields: Trns Date (11/29/2005), Type (Materials), Supplier (dropdown menu), Invoice/PO # (text box), Budget Code (dropdown menu), Purchased by (dropdown menu), Description (text area), Quantity (text box), Cost Each (text box), % Markup (text box), and % Discount (text box). A 'Back to WOID 106' link is at the top right of the form area.

- Required information fields include Transaction Date, Type, Description, Quantity, and Cost Each.

- Clicking on the **New Labor Transaction** link on the work order form will take you to the following page, where you can enter and save labor transaction information for this particular work order. See below:

The screenshot shows the Sloan County Schools Maintenance Direct website. At the top, there's a banner with the school name and a logo. Below it is a navigation bar with links for Home, Calendar, New Work Order, My Requests, and My Account. A search bar is also present. The main content area is titled "New Work Order" and shows "Back to WO 106". It features a calendar for November 2005. For each day, there are input fields for "Work Action Taken" (e.g., "106 Sloan Elementary") and "Actual Comp. Date". There are also fields for entering materials and notes. A note at the bottom of the calendar says: "(Note: You can change the display dates by clicking a day on the above calendar.)". Below the calendar, there are "Grand Total Hours" input fields and "Save" and "Reset" buttons. The footer contains links for Home, Calendar, New Work Order, My Requests, My Account, Conditions of Use, Privacy Policy, Security Statement, LOGIN, SERVICES, MY ACCOUNT, HELP, and an Email link. It also includes a "SchoolDude.com" logo and copyright information.

- If you need to account for overtime, comp time, holiday time, or any other time, you can click on OT ("Other Time") next to the corresponding date. A window will appear for you to enter in any other times.
- Click **Save** when you're done.

You may also use the Quick Launch section of the Home page (shown on the next page) to pull up labor sheets for all your assigned work orders:



**Sloan County Schools**

Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP

Maintenance DIRECT

Home Calendar New Work Order My Requests My Account

Search for: GO Advanced Search | Help

**Quick Launch**

- New Request
- Your Settings
- Labor Hours
- Purchase Transactions
- Equipment Usage
- User Forum
- SchoolDude.com site

**LOGIN HERE**

Hello Howard Dude  
Not Howard Dude? Please be yourself.

**ASSIGNED WORK**

Note: Action Taken is saved when Mark Complete button is clicked.

Sort by Request Age Ascending Descending

Filter -- Select Status --

1 - 2 of total 2 listed First 4 Prev 50 Next 50 Last

**Sloan Elementary School**

**106** Two lights out in stairwell.

Print This! Email Supervisor Make a Note

Request Age: 78 (in days)  
Assigned to: Howard Dude  
Contact:

Action Taken

Low

Mark in Progress Today's Labor Hours

Mark Complete New Request

**Sloan Community College**

Area: 2nd Floor

**109** Thermostat needs repair.

Print This! Email Supervisor Make a Note

Request Age: 76 (in days)  
Assigned to: Howard Dude  
Contact: Howard Dude  
Phone: 919-555-1647. Pager:

Action Taken

Medium

Mark in Progress

**WORK CENTER**

CALENDAR

2/14/2006 WORK (Tuesday) Get Today's Weather

OTHER ASSIGNED WORK 2

TOTAL ASSIGNED WORK 2

## VII. My Requests: Keeping Track of Your Requests.

The My Requests page allows gives you a look at all the work requests you've made in MaintenanceDirect. You can reach the My Requests page by clicking on the tab at the top of the Home page. It should look something like this, depending on how many requests you've submitted:

The screenshot shows the 'My Requests' section of the Sloan County Schools MaintenanceDirect website. At the top, there's a header with the school logo, a search bar, and navigation links for Home, Calendar, New Work Order, My Requests (which is currently selected), and My Account. A 'Logout' link and account number (32631335) are also present. On the right, there's a 'MAINTENANCE DIRECT' logo with a wrench and a key. Below the header, a legend says 'Click □ to sort table by that column.' The main area is titled 'My Requests' and displays one item: '1 - 1 of total 1 listed'. The table columns are Status, Location, Description, Action Taken, Request Date, and Complete Date. The single entry is: Status: New Request, Location: Sloan Community College, Description: 109 Thermostat needs repair, Action Taken: No Action Note, Request Date: 11/30/2005, Complete Date: Climate Control. There are 'Add New Work Order' and 'Print This!' buttons at the bottom of the list. The footer includes links for Home, Calendar, New Work Order, My Requests, My Account, and external links like SchoolDude.com, Conditions of Use, Privacy Policy, Security Statement, LOGIN, SERVICES, MY ACCOUNT (32631335), HELP, and Copyright information. It also features a live chat option 'Click here to talk to an Online Operator NOW!' and a signature for 'Ema'.

- Each request you make will be added to this list, where you can check its current status, the date you submitted it, and any Action notes that have been made.
- You can print your requests using the **Print This!** icon near the bottom of the page ( **Print This!** ).
- Add a new work order by clicking the **+Add New Work Order** icon provided at the top right-hand corner of the My Requests list. You will then be taken to the New Work Request page.

## VIII. Closing Work Orders: When It's Time to Move On.

Work orders can be designated as “Complete” or “Closed Work Order”. “Complete” work orders can be designated when you enter your labor hours from the Home page. To mark a work order as a “Closed Work Order”, you will have to open the “long form” of the work order so you can change the status box. Generally, if the actual work for the work order is done, you would mark it as “complete” because you may still have labor hours or purchase transactions to add to the work order. Once you add all transactions, however, you would then “close” the work order. Once a work order is closed, you cannot add any other transactions; in order to add transactions, you would need to re-open the work order.



**SCHOOLDUDE SAYS:** Note that you can NOT delete a work order. This is mainly for record-keeping purposes.

To mark a work order as complete, simply change its status to “Complete”. To close a work order, go in and change the status to “Closed Work Order”. Save your changes by clicking the **Save** button. See below:

Work Order: 101

**Save** **Reset**   **First** **Prev** **Next** **Last**

**Status**   
Complete

**Status Date**  
11/14/2005 1:18:07 PM

**Status Last Changed By**

## Work Order: 101

◀ First ◀ Prev Next ▶ Last ▶▶

**Status**

▾

**Status Date**

11/14/2005 1:18:07 PM

**Status Last Changed By**

## IX. Using the Calendar: See the Big Picture.

As with all other SchoolDude products, MaintenanceDirect has a **Calendar** tab—a place you can go to see what's going on, where, when, and who's involved. You can see, in easy-to-read calendar format, trips occurring on a month-to-month or year-to-year basis. You can even check the weather! In this section of your manual, we'll show you how to use the calendar and all of its options to keep you up to speed on your work load.

- To open up your calendar from wherever you are, click on the **Calendar** tab at the top of your screen.

The page that opens up will look something like this:

The screenshot shows the MaintenanceDirect website for Sloan County Schools. At the top, there are navigation links for Home, Calendar, New Work Order, My Requests, and My Account. A search bar is present, along with a 'GO' button and links for Advanced Search and Help. The top right features a user account link ('MY ACCOUNT (32631335)') and a 'HELP' link. A 'MAINTENANCE DIRECT' logo with a wrench icon is also visible. Below the header, a banner for 'TELL-A-FRIEND' is shown. The main content area is titled 'Work Calendar for November 2005'. It includes a 'Select Month/Year' dropdown set to November 2005. A 'Print Assignments' link is available. A 'View Legend' link is located above the calendar grid. The calendar grid itself shows days from Sunday to Saturday. Notable entries include '15 Matt's Birthday' on Tuesday, '28 Teacher Work Day (November)' on Friday, and '106' on Saturday. A 'Get Weather' button is located near the bottom left of the grid. A legend on the left side defines icons for MD Work Order (no icon), PM Work Order, FSD Work Order, and IT Work Order. Navigation arrows for 'Previous Month' and 'Next Month' are at the bottom of the grid.

At the top of your screen, just above the words “Work Calendar for...”, are the **Calendar Shortcuts**: **Month View**, **Day View**, **Organization Event Calendar**, **Assignment Report**, and **Get Weather**. In this section, we'll cover each of these shortcuts in turn, starting with the Month View.

1. The Month View page shows you what's going on, on a large, easy-to-read calendar, one month at a time. It's the view that shows automatically when you open up the Calendar page—in other words, the page you're looking at now.

The month you're in currently will display with arrows in the bottom left and right-hand corners that you can click on to navigate to the Previous Month or Next Month. Just below the Calendar Shortcuts, you will see two drop-down boxes, one for the month and the other for the year, which serve as another kind of shortcut, allowing you to navigate the large calendar from one month to the next without clicking multiple times on the Previous Month and Next Month buttons.

- On the Month View, each day shows in the traditional squares of a calendar, which contain any open work orders assigned to you. Open work orders are those work orders not in the “Complete”, “Closed”, “Void”, or “Duplicate” status.
- There are different icons used throughout the MaintenanceDirect Calendar page to indicate what kind of work orders the work orders on the calendar are. The legend for these icons is at the bottom of the Month View page and looks like this:

The screenshot shows a monthly calendar grid for a specific month. The days of the week are labeled across the top. Below the grid, there are navigation links for 'Previous Month' and 'Next Month'. A legend provides icons for different types of work orders: MD Work Order (no icon), PM Work Order (yellow square with wrench), FSD Work Order (blue square with clipboard), IT Work Order (green square with computer), and PD Work Order (orange square with wrench). A tip at the bottom suggests clicking on day numbers to view work order details or work order IDs to edit them.

20	21	22	23	24	25	26
27	28	29	30			

<- Previous Month      Next Month - >

**Legend**

- MD Work Order (no icon)
- PM Work Order
- FSD Work Order
- IT Work Order
- PD Work Order

Tip: Click the day number to view work order details for the entire day or click a work order id to view/edit the work order..

- Work order numbers will be displayed on the calendar as red links. If you click on a work order number, it will take you to the work order update screen. If you see a number in parentheses next to the WOID, that is the “Estimated Hours” for that work order.
- If your educational facility or district has PreventiveMaintenanceDirect, PM work orders will show as having a yellow background on the calendar, behind the WOID.

Click here  
Online!

2. The Day View page can be reached in two ways:

- Clicking on the **Day View shortcut** at the top of the page, or
- Clicking on the **number** of the date on the monthly calendar, if that day's number is shown in **red** (you can only reach the Day View this way if you have work orders assigned to you on that particular day).

The Day View automatically defaults to today's date. It shows you what's going on, one day at a time. If you have no work orders assigned for a particular day, the words "There are no assigned Work Orders for this day" will be shown. If you do have work orders, however, you will see your work orders for the day displayed on the left-hand side, along with the WOID number, the Work Order Request Description, the Location Name, and the Estimated Hours (if applicable). See red arrow below:

Sloan County Schools

Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP

Maintenance DIRECT

Home Calendar New Work Order My Requests My Account

Search for: Advanced Search | Help GO

TELL-A-FRIEND

**Calendar Shortcuts**

Month View	Day View	Organization Event Calendar	Assignment Report	Get Weather
------------	----------	-----------------------------	-------------------	-------------

**Filtering**  
View work orders starting by location:  
0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

**Work Orders for Monday 11/28/2005**

1 - 1 of total 1 listed

Assigned To Howard Dude  
WOID 106  
WO Request Two lights out in stairwell.  
Description  
Location Name Sloan Elementary School  
Estimated Hours 0

Print This!

November 2005

S	M	T	W	T	F	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	<b>28</b>	29	30	1	2	3

Previous 10 Next 10

Home Calendar New Work Order My Requests My Account

Powered by: SCHOOL DUDE .COM

Click here to talk to an Online Operator NOW!

Email

Conditions of Use | Privacy Policy | Security Statement

LOGIN SERVICES MY ACCOUNT (32631335) HELP

- You can navigate from one day to the next using the small calendar on the right-hand side of the screen (see green arrow above). Simply click the **number** of the day you wish to view. To move from one month to another, use the left and right arrows next to the name of the month at the top of the small calendar (see next page).

◀ November 2005 ▶

S	M	T	W	T	F	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

- To print a form for a work order, click on the **Print This** button for the corresponding work order.

3. The Organization Event Calendar page is where you can view events, such as school breaks, for locations/organizations within your school or district. They will then be stored on a yearly calendar on the left-hand side of the screen and then listed in more detail on the right-hand side.

You can reach the Organization Event Calendar by clicking on the short cut at the top of the Calendar page.

The Organization Event Calendar page should look something like this, depending on how many events have been entered to this point:

The screenshot shows a web-based calendar interface for the Sloan County Schools. At the top, there's a header with the school's name, a search bar, and navigation links for Home, Calendar, New Work Order, My Requests, and My Account. A 'MAINTENANCE DIRECT' logo is also present. Below the header is a 'Calendar Shortcuts' section with links for Month View, Day View, Organization Event Calendar (which is currently selected), Assignment Report, and Get Weather. A dropdown menu for 'Location' is shown with the option 'All locations'. The main content area displays a monthly calendar for January, February, and March 2005, followed by a detailed list of six events. The event list includes columns for Begin Date, End Date, Event Title, and Date Created. The events listed are: Fall Break (8/18/2005), Matt's Birthday (9/8/2005), Teacher Work Day (11/28/2005), Christmas Break (12/19/2005), Test Event 2 (3/28/2006), and Spring Break (4/17/2006). The bottom of the page shows partial calendars for July, August, and September 2005.

Begin Date	End Date	Event Title	Date Created
10/10/2005	10/14/2005	Fall Break	8/18/2005 9:05:27 AM
11/15/2005	11/15/2005	Matt's Birthday	9/8/2005 10:19:01 AM
11/28/2005	11/28/2005	Teacher Work Day (November)	11/16/2005
12/19/2005	1/6/2006	Christmas Break	9/6/2005 2:33:56 PM
3/28/2006	3/28/2006	Test Event 2	9/6/2005 2:50:43 PM
4/17/2006	4/21/2006	Spring Break	9/6/2005 2:35:47 PM

4. The Get Weather shortcut, as with the weather icon on the main monthly calendar and the Home page, serves as a link to connect you with AccuWeather.com, where you can check current weather conditions in your area or the area where work orders are being done. You can also check the forecast with a range up to fifteen days.

- Simply click on the **Get Weather** shortcut near the top of the page and a separate browser page will pop up, displaying AccuWeather.com.



- Enter your Zip Code or City/State into the box shown above and click **Go**.